# Quick Reference Guide

How to Save Text Messages

EPA *discourages* the use of text messages for transmitting substantive (or non-transitory) federal records. ([Wait, what is a "non-transitory" or "substantive" record?](#)) If a substantive (or non-transitory) text message is sent or received on your mobile device, it must be saved into an approved records management system within 20 days. In order to comply with this requirement, you can forward the text message into the EPA email system, so that you may then save it as a record using EZ Email Records, or another approved recordkeeping system. When forwarding the text message from the mobile device to the EPA email system, you must include contextual information such as the time, date, subject, and sender/recipient of the message. Please follow the instructions below to manage text messages that are substantive (or non-transitory) records.

How to Forward Text Messages to Email from an iPhone

1. Tap the "***Messages***" icon on the device.
2. Find the text message conversation that you need to save as a record.
3. Tap and hold one of the text messages in the conversation.
4. Tap the "***More***" option that appears above the text message.
5. Put a check mark in the circle beside any or all of the text messages that you want to save as records.
6. Tap the blue arrow icon in the lower right corner of the screen.
7. Type your EPA email address in the "***To***" field.
8. After the text message, enter contextual information about the message including: to, from, date, time, and a relevant subject, then tap "Send." For example, add "(To: Susan Employee, From John Worker, Date: 01.01.15, Time: 6:35 PM, Subject: Project Y)." Press ***"Send".***
9. After receiving the email containing the text message, follow the EZ Email Records process in Outlook to save the email as a record. After following these instructions, you may also notice that a copy of the message containing the contextual information created in step 8, appears in your list of messages in the Messages app on your phone.

Note: If you have problems forwarding text messages to email using the above instructions, please try the below options, starting with Option 1.

Option 1

1. Tap the Settings App > Messages > Send & Receive

2. If your email address is listed with a checkmark next to it, tap on it to uncheck.

3. Exit out of Settings and try to forward a text message to your email. If you don't have an email listed or it still doesn't work try Option 2.
   * Be sure to check your Junk Email folder to ensure it did not route there.

Option 2

4. Tap the Settings App> iTunes & App Store> Apple ID > Sign Out

5. Re-enter your Apple ID (work email address) and Apple ID password.

6. Exit out of Settings and try to forward a text message to your email.

How to Forward Text Messages to Email from a Windows Phone

1. On **Start** , tap "**Messaging**" , then tap the thread that contains the text message you want to save as a record.
2. Open the text message, press and hold the message to be forwarded, then click "**Forward**".
3. Type your EPA email address in the "**To**" field.
4. After the text message, enter contextual information about the message including: to, from, date, time, and a relevant subject, then tap "**Send**" . For example, add "(To: Susan Employee, From John Worker, Date: 01.01.15, Time: 6:35 PM, Subject: Project Y)."
5. After receiving the email containing the text message, follow the EZ Email Records process in Outlook to save the email as a record.

Note: This approach for saving text messages on a Windows phone can only be used for forwarding individual text messages. If multiple messages need to be stored as records, forward each message and the related contextual information to EPA's email system individually.

Technical Assistance

If you have questions about managing records on your mobile or portable devices, contact the Records Help Desk, and refer to the Frequent Questions about Mobile and Portable Devices, and Records for more information.